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FOOD/BEVERAGE AND ACCOMMODATION

ALBERTA TOURISM EDUCATION COUNCIL

Catering Functions Manager

CERTIFICATION STANDARDS

ALBERTA
TOURISM
EDUCATION
COUNCIL

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Alberta Chamber of Commerce

Alberta Culinary Arts Foundation

Alberta Hotel Association

Alberta Restaurant and Foodservices Association

Motel Association of Alberta

Tourism Industry Association of Alberta

Alberta Tourism

Alberta Career Development and Employment

Alberta Advanced Education

Council of Presidents (Colleges and Technical Institutes)

Alberta Vocational Centres

Universities Coordinating Council

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▼ INTRODUCTION

The tourism industry in Alberta presently creates an estimated 100,000 full-time, part-time and seasonal jobs. By the year 2000, tourism has the potential to provide 220,000 jobs for Albertans. This tremendous potential for growth represents both an opportunity and a challenge.

The Alberta Tourism Education Council is responding to that challenge. The mandate of the Council is to stimulate and integrate the resources of industry, government and education to meet the present and future education and training needs of Alberta's tourism industry.

One of the important initiatives undertaken by the Council is the development of standards for occupations within the industry. Standards now exist for various positions in the food/beverage/accommodation and adventure tourism/recreation sectors. In addition, several sets of standards exist which are applicable to all sectors of the tourism/hospitality industry. Development of standards is ongoing, leading to a range of standards for key occupations in all sectors.

Another initiative of the Council is the development of a province-wide process for certification. Certification is designed to provide individuals currently working in the tourism industry with an opportunity to demonstrate their knowledge and skills and receive industry-recognition for their achievements. Certification enables employees to further career-development goals and allows employers to hire staff that are trained to a measurable level. This in turn enhances the image of the industry and attracts energetic and talented individuals to the many exciting and rewarding career opportunities available.

If you would like more information on how you can benefit from these certification standards, please call or write:

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▼ STANDARDS OVERVIEW

WHAT ARE STANDARDS?

Standards are statements outlining what an individual must know and the skills and attitudes required of that individual to be considered competent in an occupation.

WHY DEFINE STANDARDS?

People working within the tourism industry have been labelled as unskilled workers. This stereotype is far from the truth. Central to the mandate of the Alberta Tourism Education Council is the enhancement of the image of hospitality within both the industry and the general public. Defining standards is one way to help increase awareness of the broad range of skills required of those working within this industry.

HOW ARE STANDARDS DEVELOPED?

These standards were developed from information provided by two industry committees. The Industry Validation Committee (IVC), consisting of individuals working within this occupation, provided the information from which a complete description of necessary skills was generated. The standards were written, and feedback was then provided by the Standards Industry Advisory Committee (SIAC), which is also made up of individuals working in this occupation. The IVC then met to validate the standards, considering the feedback from SIAC as well as their own suggestions.

A minimum of 40 professionals from the occupation are directly involved in developing each set of standards.

These particular standards were developed by industry professionals in Saskatchewan and then validated and adopted by industry in Alberta.

WHO BENEFITS FROM STANDARDS?

Eventually, all Albertans will benefit from the monitoring of performance in relation to industry standards. As standards gain recognition, industry professionals will maintain or increase personal skills, resulting in direct benefits to local and visiting consumers.

Specific groups who can benefit from standards are:

Service Professionals

- standards help identify career paths
- standards enhance the public image of service professionals
- standards provide a basis for challenge, self-improvement and advancement
- standards provide the basis for certification, based upon competent performance

Employers and Owners

- standards define areas where employees must be proficient, which assists in recruiting, training and development of staff
- standards provide employers and owners with a highly trained work force, which can increase productivity and decrease costs incurred by high staff turnover, translating into an improved bottom line

Educators

- standards provide the basis for curriculum and program development
- standards identify areas of industry where educational expertise is needed and applicable

Students

- standards help to promote the tourism industry as a viable and fulfilling career choice
- standards allow visualization of career options within the tourism industry

HOW ARE STANDARDS READ?

Major Categories are located in the outer margins. These indicate the general skill area within the occupation.

Skills are located in the left-hand column. These indicate abilities service professionals must demonstrate to fulfil the requirements of the position properly.

Standards are located in the right-hand column. These specify what a service professional must do and provide the knowledge necessary to accomplish the task. The centre column identifies the standard as either:

- **K (knowledge task)** - what a service professional must know to be considered competent in a skill, or

- **P (performance task)** - what a service professional must demonstrate to be considered competent in a skill, based on the requirements as stated in the knowledge standard.

HOW DO STANDARDS RELATE TO THE CERTIFICATION PROCESS?

Standards are used as the basis for the implementation of a three-step province-wide certification process for industry personnel. The initial step is a multiple choice examination which, when successfully completed, is followed by a performance evaluation completed by a supervisor in the work place. The third step is a performance evaluation conducted by a certified, trained Alberta Tourism Education Council evaluator.

WHAT DOES 'COMPANY POLICY' MEAN IN STANDARDS?

The Alberta Tourism Education Council recognizes that an establishment may have internal policies that affect the way in which a skill is performed. Therefore, some standards have 'with consideration of company policy' added to the performance portion of the standard for certification purposes.

The knowledge portion of these standards contains the typical generic policy with which the employee should be familiar in order to challenge the written examination. By learning or demonstrating an accepted generic standard, the certified professional gains the advantage of greater job mobility, as well as an appreciation of other ways of accomplishing tasks.

Company policy does not replace the generic standard; rather, it allows the Alberta Tourism Education Council evaluator to determine if performance is to the standard or follows a particular company policy. The evaluator will not fail candidates for following policies of their establishments.

▼ ACKNOWLEDGEMENTS

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We apologize if we have overlooked any contributors to this project. Please let us know if you are aware of any omissions.

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CATERING FUNCTIONS MANAGER STANDARDS

Note: Where reference is made to legislation, the reader is expressly advised to consult the original legislation, and to obtain further advice as required.

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SKILL 1: POSSESS PREREQUISITE			
1.1	possess prerequisite	**P**	possess prerequisite: industry-recognized certification for catering functions supervisor

A.
PREREQUISITE

B.
ATTITUDE

SKILL 1: EXHIBIT PROFESSIONAL ATTITUDE			
1.1	describe impact of positive attitude	K	describe impact of positive attitude: a) makes one feel: · good about self and others · energetic · enthusiastic · optimistic · useful · significant b) allows one to: · be open to new ideas · be approachable · be likable · make and keep friendships · communicate more effectively · experience greater job satisfaction · make most of situations · deal effectively with stress · enjoy better health c) affects business: · creates positive experience for client and staff · encourages new and repeat business, e.g. through positive word-of-mouth advertising · increases revenue · increases prestige · creates potential for developing greater interest, understanding and acceptance of other cultures
1.2	describe impact of negative attitude	K	describe impact of negative attitude: a) makes one feel: · negative about self and others · tired · depressed · frustrated · powerless · pessimistic · insignificant

SKILL 1: EXHIBIT PROFESSIONAL ATTITUDE			
1.2	cont'd		b) causes one to: · be closed to new ideas · be unapproachable · be unfriendly · have difficulty making and keeping friends · communicate less effectively · experience less job satisfaction · avoid new experiences · deal less effectively with stress · appear unprofessional c) affects business: · creates negative experience for customer and staff · discourages new and repeat business, e.g. through negative word-of-mouth advertising · reduces opportunities to increase revenue and prestige · decreases staff morale and initiative · increases staff turnover
1.3	exhibit professional attributes	**K**	describe professional attributes: be: a) punctual, e.g. do not keep appointments waiting, respond promptly to messages b) co-operative, e.g. make realistic demands by considering tasks, time available and employee abilities c) confident, e.g. maintain up-to-date knowledge of catering industry, share knowledge with others d) respectful, e.g. treat others politely, acknowledge contributions of others e) outgoing, e.g. smile, greet people pleasantly, have pleasant tone of voice

B.
ATTITUDE

SKILL 1: EXHIBIT PROFESSIONAL ATTITUDE			
1.3	cont'd		f) enthusiastic, e.g. be eager to do things, put energy into work g) trustworthy, e.g. honour commitments h) organized, e.g. use time planner, prioritize responsibilities i) open, e.g. accept constructive criticism, adapt to new situation, seek input from staff, maintain open-door policy j) resourceful, e.g. find solutions to problems, determine creative ways to meet needs with available resources k) thorough, e.g. write everything down, carry out responsibilities to completion
		P	exhibit professional attributes as outlined above
1.4	demonstrate professional etiquette	**K**	outline how to demonstrate professional etiquette: a) when appointments arrive early: · have someone greet them, take coat, offer chair and announce arrival · meet with appointment as soon as possible b) when visiting others: · confirm appointment prior to visit · be prompt · call if delayed · announce self and confirm time of appointment · offer handshake when greeting client and when departing

B.
ATTITUDE

SKILL 1: EXHIBIT PROFESSIONAL ATTITUDE			
1.4	cont'd		c) when answering questions: · be forthright and honest · pass on information immediately, if possible · conduct research, if necessary, and pass on information at later date d) initiate exchange of business cards: · offer cards to clients and business associates for future reference
		P	demonstrate professional etiquette as outlined above
1.5	describe importance of teamwork	**K**	describe importance of teamwork: a) success requires combined effort towards common goal b) all employees, regardless of role, contribute toward success c) working as member of team is personally rewarding d) everyone is involved in assuring customer satisfaction e) teamwork produces consistent product and service
1.6	fulfil requirements of teamwork	**K**	outline how to fulfil requirements of teamwork: a) fulfil job description b) be enthusiastic c) be flexible d) accept constructive criticism e) be patient f) override personal feelings g) share workload h) work in controlled manner i) respect fellow staff members

B.
ATTITUDE

SKILL 1: EXHIBIT PROFESSIONAL ATTITUDE			
1.6	cont'd		j) be sensitive to pressure on others k) understand operation of all areas of company l) respect chain-of-command m) comply with house policies
		P	fulfil requirements of teamwork as outlined above
1.7	outline factors that create positive first impressions	**K**	outline factors that create positive first impressions: a) establishment appearance: · facilities in good repair · cleanliness b) personal appearance: · good hygiene and grooming · appropriate dress c) body language: · firm handshake · smile · good posture
1.8	outline techniques for dealing with personal stress	**K**	outline techniques for dealing with personal stress: a) plan work schedule considering: · functions usually occur during evenings and weekends · regular office hours must be maintained for administration and bookings b) prioritize responsibilities c) maintain healthy lifestyle, for example: · set realistic goals · understand that not all goals and objectives will be met when desired and adjustments may be necessary · get regular physical exercise

B.
ATTITUDE

SKILL 1:
EXHIBIT
PROFESSIONAL
ATTITUDE

1.8 cont'd

- organize personal priorities
- get sufficient sleep
- be creative
- talk things over with others

d) practice relaxation techniques, for example:
   - deep breathing and stretching exercises
   - progressive muscle relaxation

e) separate business from personal life, for example:
   - spend time away from job
   - take holidays
   - allow sufficient leisure time for self, family and friends

f) maintain sense of humour:
   - be able to laugh at self
   - find humour in situations

B.
ATTITUDE

SKILL 2: PROMOTE PROVINCE			
2.1	be an ambassador for Alberta	**K**	outline how to be an ambassador for Alberta: a) share knowledge of area, e.g. give directions b) speak positively about Alberta c) treat visitors as welcomed guests: · realize reactions to and interactions with visitors have direct effect on tourists' impressions of Alberta
		P	be an ambassador for Alberta as outlined above
2.2	provide community information	**K**	outline how to provide community information: a) know information about community: · identify locations of services, for example: - accommodation - restaurants - tourist information centres - recreation facilities · describe attractions and events, for example: - hours or dates of operation - location - facilities and services - special features · describe area, for example: - history - industries - population - ethno-cultural heritage b) answer questions or refer to alternate source c) offer personal recommendations when asked

SKILL 2: PROMOTE PROVINCE		
2.2 cont'd	**P**	provide community information as outlined above
2.3 identify Alberta's major attractions and events	**K**	identify Alberta's major attractions and events: a) Calgary Stampede b) Klondike Days c) West Edmonton Mall d) Royal Tyrrell Museum of Paleontology e) Head-Smashed-In Buffalo Jump f) National Parks: · Banff · Elk Island · Jasper · Waterton Lakes · Wood Buffalo g) Canada Olympic Park h) Dinosaur Provincial Park
2.4 outline benefits of tourism	**K**	outline benefits of tourism: a) encourages development and use of attractions, natural areas, services and facilities b) promotes cultural events residents of Alberta can enjoy c) provides greater employment for residents of Alberta d) provides educational and multicultural experiences e) promotes goodwill amongst people f) generates additional revenue

B.
ATTITUDE

SKILL 3: OUTLINE METHODS OF INCREASING PROFESSIONAL KNOWLEDGE AND SKILLS			
3.1	outline methods of increasing professional knowledge and skills	**K**	outline methods of increasing professional knowledge and skills: a) take industry-related courses b) attend conferences, seminars and trade shows c) read trade magazines d) participate in industry associations e) gain public speaking experience f) participate in community and cultural activities

B.
ATTITUDE

SKILL 1: USE COMMUNICATION SKILLS			
1.1	present message in logical order	**K**	outline how to present message in logical order: a) start with introduction: · focus on what is to be discussed · outline purpose of discussion, order in which message will be delivered and chief points to be made b) develop details: · express details in point form · place in logical order c) summarize points: · review what has been said · signal ending of message d) seek feedback: · pause regularly and ask for response
		P	communicate effectively as outlined above
1.2	listen effectively	**K**	outline how to listen effectively: a) display interest and enthusiasm: · smile and make eye contact b) paraphrase c) recognize speaker's feelings d) keep open mind e) probe or prompt f) provide feedback g) ask questions h) listen before acting i) do not interrupt
		P	listen effectively as outlined above
1.3	identify components of non-verbal communication	**K**	identify components of non-verbal communication: a) eye contact b) handshake

C.
COMMUNICATION

SKILL 1: USE COMMUNICATION SKILLS				
	1.3	cont'd		c) meticulous dress and grooming d) body language e) facial expression f) distance between sender and receiver
	1.4	write effectively	**K**	outline how to write effectively: a) write legibly: · print or type if handwriting is poor b) use short, easy-to-understand words to convey message c) be precise: · get to point · state ideas clearly d) spell correctly e) use proper grammar: · avoid slang f) arrange sentences logically: · determine what information reader needs to know · clearly identify purpose of message g) prepare first draft, proofread and make revisions before preparing final copy
C. COMMUNICATION			**P**	write effectively as outlined above
	1.5	outline how to overcome objections	**K**	outline how to overcome objections: a) maintain positive attitude: · treat client objections with respect · do not argue with client b) listen carefully to objection: · clients sometimes provide own answers c) clarify objection: · ask questions or paraphrase to ensure objection is fully understood

SKILL 1:
USE
COMMUNICATION
SKILLS

1.5 cont'd

d) time reply:
   - do not hesitate too long before responding or client may perceive that objection is being avoided

e) answer objection completely and concisely, for example:
   - if response is too long client might get lost
   - if response is too brief client may feel objection is being ignored

f) tailor reply:
   - response to objection must be based on personality of client and objection itself

g) confirm objection has been answered:
   - unanswered objection will block negotiations

i) close sale:
   - best time is immediately after major objection has been overcome

SKILL 2: USE COMMUNICATION TOOLS			
2.1 prepare function sheet		**K**	outline how to prepare function sheet: a) record required information, including: · date of function · name of organization · client's name, address, telephone and facsimile numbers · function room reserved · nature of function · number of guests expected · number of guests guaranteed · bar requirements: - reception time - bar opening and closing times - choice of products - type of bar service - payment arrangements · meal arrangements: - room set-up - head table requirements - serving time - price per person - gratuity - menu · meetings requirements: - names of rooms - room set-up, e.g. boardroom, theatre, classroom, u-shape - time of commencement and adjournment - equipment and supplies · special arrangements: - entertainment, e.g. music - equipment, e.g. piano, stage - supplies, e.g. displays, banners

C.
COMMUNICATION

SKILL 2: USE COMMUNICATION TOOLS			
2.1	cont'd		b) record payment: · deposit received · balance of payment owing · approved method of payment · gratuities c) record date function booked d) attach itinerary e) distribute copies to client, staff and appropriate departments
		P	prepare function sheet as outlined above
2.2	outline importance of using telephone effectively	**K**	outline importance of using telephone effectively: a) telephone is often first instrument through which client comes into contact with company b) telephone is increasingly taking place of face-to-face meetings
2.3	use telephone effectively	**K**	outline how to use telephone effectively: a) answer promptly: · identify self by name, title, and company if appropriate b) be courteous: · avoid putting call on hold for any length of time · allow caller or client opportunity to terminate call c) be prepared: · jot down goal of call in advance · use notes as guidelines to explain purpose of call · check off each point as it is covered · review list to ensure everything has been covered

SKILL 2: USE COMMUNICATION TOOLS			
2.3 cont'd			d) smile: · even though it cannot be seen, it creates positive frame of mind that is reflected in voice e) speak clearly: · hold microphone directly in front of mouth · speak slowly · do not have anything in mouth while talking f) end call with salutation g) immediately write down results of conversation h) follow up as required
		P	use telephone effectively as outlined above
2.4 use business documents		**K**	outline how to use business documents: a) use proposal (bid) letter to: · welcome and thank client · state: - parties involved - duration of offer - what company will do in measurable terms - logistics of activities, i.e. where and when - costs - fees and payment schedules b) use contract (letter of agreement) to: · legally bind both parties to agreement upon signature · specify terms and conditions of transaction, including: - names of parties - addresses

C.
COMMUNICATION

SKILL 2: USE COMMUNICATION TOOLS

2.4 cont'd

- telephone and facsimile numbers
- dates of function
- rates
- number of rooms booked
- bedrooms (specific names if necessary)
- equipment provided
- food and beverage details
- times
- complementary rooms and services
- service charges
- gratuities
- regulations, if applicable
- date guarantee is required
- cut-off date
- cancellation and penalty clauses
- method of payment
- request for deposit, if applicable

c) use confirmation letter to confirm details in letter of agreement, e.g. room blocks, banquet space

d) use response letter to:
   - thank client for business in answer to compliment
   - offer appropriate compensation in answer to legitimate complaint

e) use memo to:
   - exchange internal information when face-to-face communication inappropriate
   - reinforce key points using short, succinct message

f) use function sheet to exchange internal information for each program segment regarding required facilities and services

g) use collection letter to remind client that failure to pay may lead to litigation

P use business documents as outlined above

C. COMMUNICATION

SKILL 3: FULFIL COMMUNICATION REQUIREMENTS			
3.1	identify information required by sales department	**K**	identify information required by sales department: a) post-function reports b) room set-ups c) room capacities d) floor plans e) menu design f) costing of special menus g) theme research
3.2	communicate with other departments	**K**	outline how to communicate with other departments: a) communicate activities and concerns to appropriate departments b) distribute copies of function sheets to appropriate departments c) write memo d) follow up verbally e) communicate necessary information through chain-of-command at food and beverage meetings and at department head meetings
		P	communicate with other departments as outlined above
C. COMMUNICATION 3.3	conduct staff meeting	**K**	describe how to conduct staff meeting: a) write agenda for meeting with input from interested parties that includes: · purpose · participants · time, date and place · topics to be discussed · resources needed · time meeting will end b) distribute agenda and required documents in advance of meeting

SKILL 3: FULFIL COMMUNICATION REQUIREMENTS			
3.3 cont'd		c) invite involved personnel to attend d) allow participants to discuss topics e) keep record of what was discussed during meeting, e.g. minutes, action report f) prepare and distribute record to participants to confirm decisions and agreements and remind participants of follow-up action to which they agreed g) follow up on items requiring attention h) evaluate results at next meeting	
	P	conduct staff meeting as outlined above	
3.4 conduct client meeting	**K**	outline how to conduct client meeting: a) arrange and confirm appointment b) greet client upon arrival c) put client at ease: · do not use industry jargon d) consider personality type, type of business and culture e) establish client's needs: · keep client on track · answer questions · overcome objections f) meet special requests, whenever possible g) attempt to close sale when client gives buying signal h) inform client of other functions in establishment that may affect function i) confirm business is complete: · ask client for any further concerns or questions j) close meeting	C. COMMUNICATION

SKILL 3: FULFIL COMMUNICATION REQUIREMENTS		
3.4 cont'd		k) evaluate results of meeting based on: · client's state of comfort · effectiveness of questions asked · ability to obtain required information · ability to answer client's questions
	P	conduct client meeting as outlined above

C.
COMMUNICATION

SKILL 1: PLAN ACTIVITIES			
1.1	define goals and objectives	**K**	define goals and objectives: a) goals are desired end results b) objectives are steps used to reach goals
1.2	follow guidelines to set goals and objectives	**K**	outline guidelines to set goals and objectives: a) goals: · identify desired end results · consider factors that may affect results · consider available resources · determine realistic end results to be sought · document and inform staff · review to update and revise as needed b) objectives: · identify outcomes that will indicate that goal is achieved · state in measurable terms · establish ways to evaluate progress and successful completion · document and inform staff · revise and update regularly
		P	follow guidelines to set goals and objectives as outlined above
1.3	develop action plan	**K**	describe how to develop action plan: a) list objectives to be completed: · itemize objectives in measurable terms b) rank objectives: · determine order in which objectives should be completed c) determine tasks needed to achieve each objective

SKILL 1: PLAN ACTIVITIES			
1.3 cont'd			d) estimate time requirements: · determine amount of time objectives will take to complete, based on previous experience, projects and available manpower e) assign time slot to objectives using calendar f) determine resources needed to accomplish objectives, e.g. staff, money g) advise staff of implications of plan h) implement action plan: · complete tasks and objectives in order of priority i) review plan regularly and adjust as required j) conduct post-evaluation of action plan k) analyze variances between estimated and actual outcomes for future planning
		P	develop action plan to attain objectives as outlined above
1.4 develop policies		**K**	outline how to develop policies: a) identify need for policy b) define purpose c) determine whom policy will affect, e.g. staff, department d) determine steps required to adhere to policy e) record date policy was drafted f) distribute draft to other management for review, e.g. catering functions supervisor, operations director, controller g) review feedback

D.
MANAGEMENT

SKILL 1: PLAN ACTIVITIES			
1.4	cont'd		h) revise policy, if necessary i) inform staff of policy and implementation date j) implement policy
		P	develop policies as outlined above
1.5	outline benefits of check-lists	**K**	outline benefits of check-lists: a) improve organization of tasks b) improve efficiency of task completion c) facilitate staff training d) maintain consistency in procedures
1.6	design check-lists	**K**	outline how to design check-lists: a) determine purpose of check-list, e.g. off-premises, service, closing b) list details related to purpose c) order details according to importance or sequence d) design format of check-list e) seek input from supervisor and staff f) use check-list in trial run g) make revisions if necessary h) submit for duplication
		P	design check-lists as outlined above
1.7	manage time	**K**	outline how to manage time: a) set short, medium and long-range goals: · establish and assess objectives for goals · rank goals · assign time slots

	SKILL 1: PLAN ACTIVITIES			
	1.7 cont'd			b) ensure objectives are met: · outline steps required to achieve objectives · determine deadlines for steps · assign tasks to appropriate staff · establish objective review dates c) use time planner: · record daily activities: - correspondence - appointments - deadlines - persons to whom tasks are delegated · update regularly d) plan day: · review time planner · check files · consider deadlines e) plan upcoming day: · check files and in-basket · determine: - tasks to be completed - necessary follow-up · confirm appointments · rank activities
			P	manage time as outlined above
D. MANAGEMENT	1.8 follow decision-making process		**K**	describe decision-making process: a) define issue b) identify resources, e.g. personnel, equipment, finances c) identify alternatives d) evaluate alternatives: · consider resources available · consider advantages and disadvantages · consider consequences e) select best alternative

SKILL 1: PLAN ACTIVITIES			
1.8	cont'd		f) plan how to achieve chosen alternative: · determine: - what steps are required - when steps will be carried out - what resources are required - who is responsible for completing steps g) implement plan h) monitor plan: · review steps being followed · review time lines · review resource allocations · consider feedback i) evaluate effectiveness of decision: · compare end results with expected outcome · identify advantages and disadvantages of results
		P	follow decision-making process as outlined above
1.9	delegate responsibility	**K**	outline how to delegate responsibility: a) determine tasks to be completed b) identify: · tasks that must be completed by self · tasks that can be done by others c) assign tasks that can be done by others according to areas of responsibility and competency: · specify details for task completion
		P	delegate responsibility as outlined above

SKILL 2: DEVELOP HUMAN RESOURCES		
2.1 provide leadership	**K**	outline how to provide leadership: a) share expertise in product knowledge and service skills b) provide opportunities for professional development: · consult with staff to: - determine individual goals and objectives - develop career path - identify training needs · provide or recommend training sources, e.g. on-site, books, outside training courses c) delegate duties according to required tasks and individual's abilities d) address concerns of staff promptly and fairly e) foster team spirit
	P	provide leadership as outlined above
2.2 motivate staff	**K**	outline how to motivate staff: a) recognize individual needs, for example: · to feel part of company · recognition for efforts · desire for advancement · socializing with peers · fulfilling family responsibilities b) identify ways to accommodate needs, for example: · maintain regular communication · provide positive feedback · provide training opportunities · encourage staff social functions · show consideration for staff's personal life, e.g. allow time off for family matters

SKILL 2: DEVELOP HUMAN RESOURCES			
2.2	cont'd	**P**	motivate staff as outlined above
2.3	recognize staff's efforts	**K**	outline how to recognize staff's efforts: a) acknowledge efforts informally: · thank staff for contribution · chat with staff frequently b) establish formal recognition program: · seek input from: - research documents - staff - peers - director · recognize staff on special occasions, for example: - exceptional service - exceptional accomplishments - long-term employment - personal dates, e.g. birthday · provide rewards, for example: - post or distribute thank-you letter to employee - recommend salary increase or promotion - increase responsibility · inform staff of recognition program
		P	recognize staff's efforts as outlined above, with consideration of company policy
2.4	use strategies to encourage teamwork	**K**	describe strategies to encourage teamwork: a) identify lines of communication following chain-of-command b) maintain regular and clear communication with staff: · hold regular staff meetings to gather and present information, for example: - make announcements

	SKILL 2: DEVELOP HUMAN RESOURCES			
	2.4 cont'd			- review policies and procedures - discuss problems and make decisions - address concerns · post or distribute written information, e.g. newsletter, memorandum, guest feedback · hold one-on-one meetings with staff · discuss issues with staff during walk-throughs c) seek feedback and be receptive to staff input: · ask for questions or comments · maintain open-door policy · use suggestion box for anonymous feedback · respond to feedback d) assist staff whenever possible e) share knowledge f) develop positive relationship with other departments, for example: · ask for input · assist where possible · thank others for assistance
D. MANAGEMENT			**P**	use strategies to encourage teamwork as outlined above
	2.5 develop job descriptions		**K**	outline how to develop job descriptions: a) state job title b) write general summary c) describe duties d) list related expectations, e.g. attitude, punctuality e) identify reporting structure, e.g. chain-of-command f) identify hours and shift requirements

SKILL 2: DEVELOP HUMAN RESOURCES			
2.5	cont'd	**P**	develop job descriptions as outlined above
2.6	hire staff	**K**	outline how to hire staff: a) recruit applicants, considering: · present employees due for promotions or transfers · referrals from employees and business associates · applications on file · schools · employment agencies and Canada Manpower b) select applicants for interviews, considering: · qualifications · appearance of application, e.g. neatness, correct grammar c) interview applicants d) create short list of applicants: · eliminate unsuitable applicants · rank remaining applicants e) check references: · confirm dates of employment · confirm job position · ask about past performance f) extend offer to most suitable applicant g) notify unsuccessful applicants
		P	hire staff as outlined above, with consideration of company policy
2.7	follow interview process	**K**	describe interview process: a) prepare for interview: · schedule interviews · inform applicants of interview time · select private, comfortable place · assemble necessary documents, wage scales and relevant information

	SKILL 2: DEVELOP HUMAN RESOURCES			
	2.7 cont'd			b) open interview: · greet applicant, be friendly and put applicant at ease · review job to ensure applicant understands position · inform applicant of company policies, history and relevant information c) assess candidate's knowledge, skills and attitudes: · review and ask about information on application form · state hypothetical cases and ask for response · ask about strengths, weaknesses and future plans d) close interview: · ask applicant for any questions · ask when applicant would be available if hired · ask about salary expectations · thank applicant and indicate response date
			P	follow interview process as outlined above, with consideration of company policy
D. MANAGEMENT	2.8 implement training programs		**K**	outline how to implement training programs: a) determine training needs based on: · feedback from supervisors · performance reviews · company and staff goals · customer comments · need to improve: - safety and sanitation - skills

SKILL 2:
DEVELOP HUMAN RESOURCES

2.8 cont'd

- need to increase:
  - profitability
  - productivity

b) establish training objectives based on needs

c) design training program:
- choose from resources available:
  - internal:
    - in-house expertise
    - company manuals and training programs
  - external:
    - outside expertise
    - purchased programs, e.g. Food Safe, seminars, videos
- set location, time and date of program

e) inform participants

f) evaluate training programs:
- determine if program met objectives:
  - ask participants and presenters for feedback
  - review examination results and performance reviews
- revise training programs as required

P implement training programs as outlined above

D.
MANAGEMENT

	SKILL 3: ENSURE QUALITY CONTROL			
	3.1	ensure catering department meets standards	**K**	outline how to ensure catering department meets standards: a) identify standards established by upper management b) inform staff and related departments of standards on regular basis c) observe whether standards are being met: · review completeness of checklists · carry out regular inspections · seek client feedback, e.g. provide questionnaires on consultation, food, service, timing and facility · seek staff feedback · review post-function reports d) if standards are being met: · praise staff e) if standards are not being met: · determine source of problem · resolve problem, e.g. provide training, adjust communication system
			P	ensure catering department meets standards as outlined above
D. MANAGEMENT	3.2	conduct function follow-up	**K**	outline how to complete function follow-up: a) contact client: · check satisfaction · respond to client comments: - if positive thank client - if negative determine compensation to match severity of complaint - inform staff of comments

SKILL 3: ENSURE QUALITY CONTROL		
3.2 cont'd		· conduct billing review · suggest booking possible upcoming functions b) complete post-function report c) file post-function report in client file
	P	conduct function follow-up as outlined above

SKILL 1: ADHERE TO PROVINCIAL REGULATIONS			
1.1	outline *Employment Standards Code* regarding maintenance of employment records	**K**	outline *Employment Standards Code* regarding maintenance of employment records: 18(1) ... every employer shall maintain in each place of business operated by the employer in Alberta a record of the following in respect of each of his employees at that place of business: (a) hours of work each day, recorded daily; (b) wages and overtime pay paid; (c) time off in place of overtime pay provided and taken; (d) name, address and date of birth; (e) date of commencement of the present term of employment; (f) wage rate and overtime rate at commencement of employment, and date and particulars of each change to them; (g) each annual vacation granted, showing (i) the date of commencement and completion, and (ii) the period of employment covered by the annual vacation; (h) amount of vacation pay paid; (i) general holiday pay paid and the date on which a general holiday is taken if it is not taken on the actual day of the general holiday; (j) amount of each deduction from the wages, overtime pay or entitlements of the employee and the purpose for which each deduction is made; (k) copies of written requests to an employee to return to work after a temporary layoff and any notice of termination of employment; (l) amount of money paid in place of notice of termination of employment; (m) copies of all letters, documents and certification relating to parental benefits.

SKILL 1:
ADHERE TO
PROVINCIAL
REGULATIONS

1.1 cont'd

(2) Subsection (1)(a) does not apply to an employee employed entirely in
(a) a supervisory capacity,
(b) a managerial capacity, or
(c) a capacity concerning matters of a confidential nature
and whose duties do not, other than in an incidental way, consist of work similar to that performed by other employees who are not so employed.

(AR/88 cE-10.2 s18)

1.2 outline *Employment Standards Code* concerning vacation and vacation pay entitlement

K outline *Employment Standards Code* concerning vacation and vacation pay entitlement:

39(1) ... an employer shall give to each of his employees,
(a) after each year of employment with the employer, an annual vacation of at least 2 weeks, and
(b) after 5 years of employment with the employer, an annual vacation of at least 3 weeks with vacation pay calculated in accordance with subsection (2) to (4).
(2) The vacation pay payable for each week of vacation to an employee who is paid by the month is an amount equal to the wage of the employee for his normal hours of work in a month divided by 4 1/3.
(3) The vacation pay payable to an employee who is paid other than by the month
(a) in the case of an employee who is entitled to 2 weeks of vacation is an amount equal to 4% of the employee's wages for the year of employment with respect to which the vacation is given, and
(b) in the case of an employee who is entitled to 3 weeks of vacation is an amount equal to 6% of the employee's wages for the year of employment with respect to which the vacation is given.

SKILL 1:
ADHERE TO
PROVINCIAL
REGULATIONS

1.2 cont'd

(4) Vacation pay paid to an employee shall be deemed to be wages for the purpose of calculating the vacation pay payable to the employee in the following year.

(AR/88 cE10.2 s39)

1.3 adhere to *Occupational Health and Safety Act* regarding joint work site health and safety committees

K outline *Occupational Health and Safety Act* regarding joint work site health and safety committees:

25(1) The Minister may, by order, require that there be established at any work site a joint work site health and safety committee which shall

(a) identify situations which may be unhealthy or unsafe in respect of the work site

(b) make recommendations to principal contractors, employers and workers for the improvement of the health and safety of workers at or on the work site,

(c) establish and maintain educational programs regarding the health and safety or workers at or on the work site, and

(d) carry out those duties and functions prescribed by the regulations.

(2) A joint work site health and safety committee shall consist of workers who represent the workers at the work site and persons who represent the employer or principal contractor and employers, as the case may be, responsible for that work site.

(3) The number of persons on a joint work site health and safety committee who represent the employer or the principal contractor and employers, as the case may be, shall not exceed in total the number of workers on the committee who represent the workers at the site ...

E.
ADMINISTRATION

SKILL 1:
ADHERE TO
PROVINCIAL
REGULATIONS

1.3 cont'd

(5) A joint work site health and safety committee shall hold its meetings and carry out its duties and functions during normal working hours.
(6) No disciplinary action shall be taken against a member of a joint work site health and safety committee by reason of that member performing duties and functions as a member of that committee ...

(RSA/80 c0-2 s25; 80 c15(Supp) s20)

P adhere to *Occupational Health and Safety Act* regarding joint work site health and safety committees

1.4 outline *Innkeepers Act* regarding liability of innkeeper

K outline *Innkeepers Act* regarding liability of innkeeper:

7 An innkeeper is not liable to make good to his guest any loss of or injury to property brought to his inn, except
(a) when the property has been stolen, lost or injured through the wilful act, default or neglect of the innkeeper or his servants,
(b) when the property, other than a vehicle, has been expressly delivered for safe custody to the innkeeper, but the innkeeper may, if he thinks fit, require as a condition of his liability under this clause that the property be deposited in a box or other receptacle and fastened and sealed by the person depositing it, or

SKILL 1:
ADHERE TO
PROVINCIAL
REGULATIONS

1.4 cont'd

(c) when a vehicle has been expressly delivered into the custody of the innkeeper for storage or parking in a place specifically reserved and designated by the innkeeper for the storage or parking of vehicles, in which case the liability of the innkeeper for the vehicle and its contents is that of a bailee for reward.

(RSA/80 c1-4 s7)

1.5 outline *Innkeepers Act* regarding penalties for disturbance

K outline *Innkeepers Act* regarding penalties for disturbance:

9(1) In this section "disturbance" means a disturbance of the peace and quiet of the occupants of an inn by fighting, screaming, shouting, singing or otherwise causing loud noise.

(2) A person who

(a) causes a disturbance in an inn and, having been requested by the innkeeper or his agent to desist, continues to cause or again cause a disturbance, or

(b) having caused a disturbance, fails to leave the inn forthwith after being requested to do so by the innkeeper or his agent,

is guilty of an offence and liable to a fine of not more than $500 or to imprisonment for 6 months or to both.

(RSA/80 c1-4 s9; 1981 c18 s3)

E.
ADMINISTRATION

SKILL 2: ENFORCE POLICY			
2.1	enforce gratuity policy	**K**	outline gratuity policy: a) charge client customary percentage of total food and beverage sales b) distribute among staff using system approved for establishment, e.g. point-system, pro-rate according to hours worked
		P	enforce gratuity policy as outlined above, with consideration of company policy
2.2	enforce policy regarding security and client privacy	**K**	outline policy regarding security and client privacy: a) use sign-out system for keys b) keep booking details confidential c) keep private conversations with client confidential d) provide services to ensure privacy and security at functions, for example: · post 'meeting in progress' signs · take tickets at door · request identification or name tags at door · register guests · lock doors, if allowed by Fire Code
		P	enforce policy regarding security and client privacy as outlined above, with consideration of company policy

SKILL 3: CONTROL COSTS			
3.1	identify variable costs	**K**	identify variable costs: a) food and beverage b) labour c) transportation d) services and rentals e) serviceware: · washing · handling · recovery (out-catering) · breakage f) decorations g) linens h) uniforms i) equipment
3.2	list reasons for cost control	**K**	list reasons for cost control: a) maximize profitability b) control waste c) control theft
3.3	control costs	**K**	outline how to control costs: a) ensure inventory is taken regularly b) ensure stock is being stored properly to prevent waste c) enforce requisition system: · ensure written record of issues from stores to user department are kept · ensure only authorized signatures are accepted d) inform management of capital expenditure requirements, e.g. renovations, repairs: · document comments from staff and clients

E.
ADMINISTRATION

SKILL 3: CONTROL COSTS		
3.3 cont'd		e) make recommendations to management on purchasing and rentals based on catering needs and quality of purchases
	P	control costs as outlined above, with consideration of company policy

SKILL 4: ORGANIZE OFFICE			
4.1 manage office		**K**	outline how to manage office: a) develop system to organize paperwork, for example: · filing system · desk organization · in/out system · appointment records b) keep documents up-to-date, for example: · revise form letters, as required · update records of employment, e.g. time sheets, evaluations · complete cancellation forms for lost business · produce daily and weekly function checklists c) ensure documents are accurate: · proof-read correspondence and contracts · confirm details of contracts prior to and after event d) keep paper flow moving: · complete correspondence and contracts by required date · forward documents to appropriate parties e) ensure sufficient quantities of: · office supplies, e.g. pens, paper · print materials, e.g. contracts, brochures, business cards, menus
		P	manage office as outlined above

E.
ADMINISTRATION

SKILL 4: ORGANIZE OFFICE		
4.2 organize filing system	**K**	outline how to organize filing system: a) maintain client files: · create upon initial contact: - record contact information, e.g. names, telephone and facsimile number · update after functions: - include contracts, internal function reports, quality control questionnaires b) maintain tentative bookings file: · record information about potential bookings · follow up on potential bookings weekly · record decision: - place information in client file if booking not made - place information in function file if booking made c) maintain function files: · record details of function, e.g. date, time, size, menu · update file after each contact: - record function requests and name of person with request · file chronologically, i.e. according to date of function: - functions in upcoming year are filed by month - functions in upcoming three months are filed by day d) maintain index file: · record client's name, address, telephone and facsimile numbers and date of function(s) on index card · file alphabetically to use as cross-reference to function files

SKILL 4: ORGANIZE OFFICE			
4.2	cont'd	**P**	organize filing system as outlined above, with consideration of company policy

E.
ADMINISTRATION

SKILL 1:
DEFINE FUNCTION TERMINOLOGY

1.1	define function terminology	**K**	define function terminology: a) exhibit: · floor load: weight per square foot that exhibit floor can accommodate · net square feet: net saleable exhibit space b) room reservation: · booking report: form used to book block of rooms · complimentary (comp): without charge · convention rate: rate for convention delegates · corporate rate: rate charged regular business customers for individual room reservations · day rate: usually one-half of regular rate for use of room during day, e.g. up to 5:00 p.m. · flat rate: specific room rate for group, agreed upon in advance · government rate: rate charged to government employees on government business · rack rate: current regular rate charged for accommodation · room block: ten or more guest rooms offered at special rate

SKILL 1:
DEFINE FUNCTION TERMINOLOGY

1.1 cont'd

- run-of-the-house rate:
  flat rate at which supplier agrees to offer any available rooms to group
- upgrade:
  change to higher class of accommodation

SKILL 2: USE PRODUCT KNOWLEDGE TO BOOK FUNCTIONS			
2.1	outline parking information	**K**	outline parking information: a) location of parking lots, both on and off property b) contact names c) features: · underground · electrical outlets · security: - lights - closed entrance · number of stalls d) parking charges: · availability of passes · municipal parking programs, e.g. conventioners' special rate e) large vehicle parking
2.2	identify food and beverage knowledge required to book functions	**K**	identify food and beverage knowledge required to book functions: a) food items: · menu categories · taste of items · item ingredients · preparation methods · preparation times · complementing items · best-sellers · chef's recommendation(s) · presentation of items · prices · cost factors b) beverage items: · taste and style of items · origin of items · best sellers · prices · cost factors · complementary foods

SKILL 2: USE PRODUCT KNOWLEDGE TO BOOK FUNCTIONS			
2.3	outline special dietary needs	**K**	outline special dietary needs: a) low fat diet requires: · information on fat used in preparation of menu items, eg. extra butter, oil, margarine, shortening, cream or cheeses added · items to be baked, broiled, poached or roasted instead of fried · dressings and sauces omitted or served on side · low fat desserts, e.g. fresh or canned fruit, gelatin, angel food cake b) low cholesterol diet requires: · information on high cholesterol ingredients in foods, e.g. egg yolks, shrimp, lobster, organ meats · elimination of saturated fats, e.g. fatty meats, high-fat dairy products, lard, shortening, palm and coconut oil, hydrogenated fat · restricted use of polyunsaturated fats, e.g. soft margarines, sunflower, corn, safflower oils and monounsaturated fats, e.g. canola, peanut, olive oils c) low salt diet requires: · information on amount of salt used in food preparation, e.g. powdered soup, gravy bases, cured meats have high salt content · food be prepared without added salt, monosodium glutamate (MSG) and soya sauce

SKILL 2: USE PRODUCT KNOWLEDGE TO BOOK FUNCTIONS			
2.3 cont'd			· products with visible salt be replaced with unsalted products d) allergy diet requires: · items that do not contain allergen(s) e) lacto-ovo vegetarian diet requires: · items with no meat, however, will eat animal products, e.g. cheese, milk, yogurt f) vegan diets require: · items that contain no meat nor animal products g) reducing diet requires: · food prepared with as little fat as possible, e.g. lean well-trimmed meats · smaller servings · sauces and dressing served on side · low calorie entreés, desserts and diet beverages h) diabetic diet requires: · information on sugar content of items
2.4 recommend appropriate menu items to client	**K**	outline how to recommend appropriate menu items to client: recommend items that are: a) appropriate to function and client, e.g. consider dietary needs, function theme, budget limitations b) easily and safely served, e.g. items which keep well should be recommended for off-premise catering c) easily transported for off-premises catering d) within capabilities of kitchen e) in season, e.g. winter strawberries are often bland and expensive	
	P	recommend appropriate menu items as outlined above	

SKILL 3: USE SELLING SKILLS			
3.1	outline how to fulfil role in selling and marketing of business	**K**	outline how to fulfil role in selling and marketing of business: use resources that are presented or readily available, e.g. business cards, past clients, referrals; do not solicit new business as that is role of sales department
3.2	define sales blitz	**K**	define sales blitz: burst of concentrated one-on-one sales calls and promotional activities in specific area over specific period of time
3.3	conduct telephone blitz on former clients	**K**	outline how to conduct telephone blitz on former clients: a) compile names of clients who have not used services recently: · refer to client files b) call clients: · complete client information form, e.g. document key contact and upcoming functions · set future contact date · ask for referrals, e.g. businesses or departments requiring catering service
		P	conduct telephone blitz on former clients as outlined above
3.4	use sales incentives	**K**	outline how to use sales incentives: a) negotiate price discounts b) offer complimentary services, for example: · complimentary rooms · fruit baskets

F.
FUNCTIONS

SKILL 3: USE SELLING SKILLS			
3.4	cont'd		· disposable plates · secretarial services c) offer special services, e.g. company-coloured napkins, theme decorations, flowers
		P	use sales incentives as outlined above
3.5	outline purpose of qualifying clients	**K**	outline purpose of qualifying clients: a) to determine whether clients' needs can be met b) to determine whether client fits into company's target market
3.6	qualify clients	**K**	outline how to qualify clients: ensure client: a) has want or need that can be satisfied by company b) can afford product or service c) has authority to make purchase d) is accessible e) meets special qualifications necessary to buy product or service
		P	qualify clients as outlined above
3.7	define familiarization tours and location inspections	**K**	define familiarization tours and location inspections: a) familiarization tours: walk-through of facility with client to determine whether facility can meet client's needs b) location inspections: inspection of facility by caterer to determine if can be used for function and if so, what amenities and equipment are available

SKILL 3: USE SELLING SKILLS			
3.8	identify indicators of personality type	**K**	identify indicators of personality type: a) body language b) mannerisms c) punctuality d) communication skills e) organizational skills f) decision-making skills, e.g. speed done, changing mind
3.9	respond to different personality types	**K**	describe how to respond to different personality types: a) for analytical types: · be systematic · use efficient manner · provide sufficient information about product or service · allow time for buyer to consider recommendations b) for amiable types: · take time to establish trusting relationship with buyer · take time to understand needs of buyer and organization · be responsive to requests and problems of buyer c) for driver types: · listen willingly · avoid becoming defensive · follow-up on requests promptly · provide buyer with case histories, references and factual support information whenever possible · allow buyer time to consider options

F.
FUNCTIONS

SKILL 3: USE SELLING SKILLS			
3.9	cont'd		d) for expressive types: · question and listen well · demonstrate competence · allow buyer to provide input to proposal · help buyer get internal support for proposal · stay on top of sale after it has been closed
		P	respond to different personality types as outlined above
3.10	define buying signals	**K**	define buying signals: verbal and non-verbal indications that client is close to making decision to buy
3.11	identify common buying signals	**K**	identify common buying signals: a) physical confirmation, e.g. nodding, confident manner, leaning forward to listen more attentively, relaxing b) interest in specific dates, e.g. 'So, the ballroom is available March 15.' c) verbal confirmation, e.g. 'Right, roast beef dinner for 150 on the 7th.' d) discussion of incidentals

SKILL 4: FOLLOW BOOKING PROCEDURE			
4.1	outline guidelines regarding contracts	**K**	outline guidelines regarding contracts: a) review contract with client and answer questions: · ensure information is accurate · ensure client is aware of deposit requirements, cancellation clause, guaranteed number and confirmation date b) ensure all agreements and conditions of contract are recorded c) seek legal advice before signing contract
4.2	follow booking procedure	**K**	describe booking procedure: a) qualify client: · if client qualifies, carry on with procedure · if client does not qualify, inform client and discontinue procedure b) check availability of space by referring to function sheets and log book c) check for alternate dates, if required d) record tentative booking e) record client's name, name of company if applicable, telephone and facsimile numbers, address, position or title of contract f) determine needs and costs of function: · refer to existing client file · ask client about: - number of rooms required - room set-up - break-out rooms - theme - decorations and decor - function itinerary, e.g. guest arrival, food and bar service

SKILL 4:
FOLLOW BOOKING PROCEDURE

4.2 cont'd

- equipment requirements, e.g. telephone, computer, audio-visual
- menus
- beverage service
- rentals
- protocol
- parking, e.g. number of stalls required
- additional special needs, e.g. daycare, significant-others program

g) tour facility with client:
   - inspect off-premises venue for:
     - booking access
     - size of rooms
     - unloading and loading facilities
     - electrical hook-ups
     - water supply
     - kitchen facilities, e.g. fridge, stove
     - waste disposal

h) upsell when possible, for example, suggest:
   - premium menus
   - hospitality suites
   - other services of property

i) explain and document billing procedures, for example:
   - deposit policy
   - guaranteed numbers
   - cancellation policy and charges
   - credit policy
   - service review prior to final billing
   - method of payment
   - gratuity policy

j) provide tentative booking quote

k) designate option and cut-off dates

SKILL 4: FOLLOW BOOKING PROCEDURE		
4.2 cont'd		l) verify client credit with accounting department m) confirm bookings with other departments n) prepare contract o) forward function contract to client for approval and signature p) complete function sheets and required forms q) record action taken in log book r) distribute copies of function sheet to departments involved, e.g. kitchen, purchasing, accounting
	P	follow booking procedure as outlined above

F.
FUNCTIONS

▼ GLOSSARY

bid - quote for services to be rendered

closed question - enquiry that limits speakers response to single word, usually yes or no

collection letter - reminder that failure to pay may lead to litigation

confirmation letter - confirms details in contract

contact file - three-by-five inch cards filed in alphabetical order by name of contact person

contract - also known as letter of agreement

cut-off date - agreed upon date when client will provide seller with required information

function sheet - internal exchanges of information created for segments of program stating agreements of contract

geographics file - cross-reference file consisting of clients' names filed according to location of business

gratuity - money given in appreciation of services rendered; can be paid in cash, entered on charge slip or added to guest cheque or contract; commonly called tip

index file - contains clients' names on three-by-five inch cards; filed under key word

letter of agreement - letter from buyer accepting proposal

master file - letter-sized folders containing details of bookings; filed alphabetically by clients' names

memo - internal exchanges of information that are maximum of one page long

▼ GLOSSARY cont'd

objections - honest points of difference between buyer and seller

open-ended question - general enquiry that requires more elaborate response than simply yes or no

option date - day that client must change tentative booking to definite booking

proposal letter - first letter sent by seller to buyer outlining offer

trace card - file system used to track activities of each function; usually filed by dates

upsell - sell products of higher price in place of, or in addition to, those requested

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